

CORE- Mailroom Scanning

Purpose:

Documents are scanned to create an image that can be viewed and/or worked electronically. There are two different programs that documents are scanned into depending on the type of document that it is: Transform Remote Scan Client (TR Scan Client) and OnBase. All documents that are scanned will receive a unique Imprinter Number. Each document scanned into the Transform Remote Scan Client (TR Scan Client) is separated by a "Patch Page" if the document is a multi-page document. Items scanned into OnBase are separated by a "Bar-code Page". The Mailroom staff must scan all documents within one business day of receipt of the document. There are specific steps that take place to ensure that this gets done.

Identification of Roles:

Data Entry/Imaging Technician (DE/IT) – perform scanning functions

Operations Coordinator, Operations Team Lead, and Operations Manager – operate as a resource for scanning functions; implement process changes as needed

Performance Standards:

Log, image and assign a unique control number to every Claim, Attachment, Adjustment/Void, Prior Authorization and other documents submitted by Providers within one (1) business day of receipt.

Provide access to imaged documents to all users within one (1) business day of completion of the imaging. Response time for accessing imaged documents at the desktop must not exceed ten (10) seconds.

Path of Business Procedure:

Step 1: Clean the scanner daily

Step 2: Log into the appropriate program

- a. TR Scan Client
- b. OnBase

Step 3: Prepare to Scan documents

- a. Select the appropriate Scan Form (TR Scan Client)
- b. Select "Scan/Index" from the Processing tab and choose the IME Correspondence Scan Queue (OnBase)

Step 4: Enter the Keywords

- a. Enter the following Keywords for the TR Scan Client
 1. Julian Date
 2. PO Box #
 3. Archive box #
 4. Special Batch indicator
 5. Priority # if needed
- b. Enter the following Keywords for OnBase
 1. Date received (OnBase)
 2. Workload type (OnBase)
 3. Archive box #

Step 5: Place documents in the elevator to be scanned and select the “SCAN” option (TR Scan Client and OnBase)

Step 6: Observe documents as they go through the scanner

Step 7: Scanning complete

- a. Select “Submit Batch” (TR Scan Client)
- b. Select “Done” (OnBase)

Step 8: Perform the Commit function on the documents that were scanned into OnBase

Step 9: Initial and date the Scan Job Coversheet

Step 10: Write the last five digits of the imprinter # on the Coversheet for claims

- a. Items going into the claims archive box
- b. Items going into the priority archive box

Step 11: Route scanned documents to appropriate destination

- a. Archive box which will be taken to the archive room once the box is full
- b. Unit within Iowa Medicaid Enterprise

Forms/Reports:

Scan Job Coversheets

RFP References:

5.2.2.3.4.1.2

Interfaces:

TR Scan Client, OnBase

Attachments:

Scan Job Coversheet

CLAIMS

YEAR/JULIAN TO ASSIGN: ____ - ____ **A / F**
 Y Y J J J

Singles Claims Attach Pharmacy Attach

Pharmacy Singles

PO BOX #: 150001	36330	36390	36446	36450
36475	36476	36478	36510	36506
310202	INTERNAL	POLICY	STREET	

TODAY'S DATE: _____ **INITIALS:** _____

DATE IMAGED: _____

IMAGED BY CLERK ID: _____

Scan Job Coversheet

SURS

YEAR/JULIAN TO ASSIGN: - **F / T**
Y Y J J J

SURS SURS 2D CORR

PO BOX #: 150001 36390 36445 36446 36506

36450 36475 36476 36478 36510

INTERNAL POLICY STREET RESUB

TODAY'S DATE: _____ INITIALS:

DATE IMAGED: _____

IMAGED BY CLERK ID: _____

Scan Job Coversheet

CORRESPONDENCE

YEAR/JULIAN TO ASSIGN: ____ - ____ **A / F / T**
Y Y J J J

2D CORR Attach 2D CORR Singles Adjustment Checks

CORR Cost Reports Med Needy Member Enroll Policy

POS Checks Recoupment Rev CORR RTP Attach

RTP Singles SIQ RTS Mail

SCAN FORM: _____

PO BOX: 14485 150001 36330 36390 36445 36446
36450 36475 36476 36478 36510 36506 310195
310202 INTERNAL POLICY STREET DIA RETURN
RESUB HIPP HIPPRET FRONT

TODAY'S DATE: _____ INITIALS: _____/_____

DATE IMAGED: _____

IMAGED BY CLERK ID: _____/_____

Scan Job Coversheet

SPECIAL BATCH

YEAR/JULIAN TO ASSIGN: $\frac{\text{Y}}{\text{Y}} - \frac{\text{J}}{\text{J}} \frac{\text{J}}{\text{J}}$

CLAIM TYPE:

HCFA Attach

UB Attach

Dental Attach

TMC Attach

Institutional X-over Attach

Professional X-over Attach

Inpatient X-over Attach

Outpatient X-over Attach

PO BOX #: 36506 INTERNAL POLICY RESUB
SCREEN

SPECIAL BATCH: **YES**

SCAN PRIORITY: **50 150 255**

TODAY'S DATE: _____ INITIALS: _____

DATE IMAGED: _____ IMAGED BY CLERK ID: _____

YEAR/JULIAN TO ASSIGN: -
 Y Y J J J

LTC - AD

PO BOX #: SCREEN RESUB INTERNAL

SCAN PRIORITY: 50 100(trays) 175(reject) 255

TODAY'S DATE: _____ INITIALS: _____

DATE IMAGED: _____ IMAGED BY CLERK ID: _____